



VRManager™

Manual

9/2005 4500-5002-5.0B

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AltiGen Communications, Inc.
4555 Cushing Pkwy.
Fremont, CA 94538
Telephone: 510-252-9712
Fax: 510-252-9738
E-mail: info@altigen.com
Web site: www.altigen.com

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9/2005 4500-5002-5.0B

Contents

CHAPTER 1

- Introduction**1
- About This Guide 1
- Requirements 1
- VRManager License 2

CHAPTER 2

- Installing VRManager**3
- Pre-Setup Required for MSDE 2000 3
- Installing VRManager for a System Administrator 4
 - Fresh Install 4
 - Upgrade from Previous Version 5
- Installing VRManager for a Client 6
- Setting Access Privileges 6

CHAPTER 3

- Using VRManager Admin**7
- Login 7
- VRM Admin Window 7
 - User Page 8
 - Adding Users 8
 - Changing the Admin Password 9
 - Pooling Page 10
 - Storage Page 11
 - Log Page 13
 - AltiWare ACM Page 15
 - Adding Servers 16
 - Changing the Centralized Recording Directory 17

CHAPTER 4

Using VRManager Client	19
Login	19
VRM Client Main Window	20
Menu Bar	20
Quick Access Toolbar	21
File Menu	22
Saving Files	22
Export to File	23
Change Password	23
Edit Menu	24
Searching Voice Records	24
Playing Voice Records	25
Displaying Columns	25
Sorting	26
Media Player Option	27
Report Menu	27

Introduction

About This Manual

This manual provides instructions for installing and using VRManager.

VRManager is designed to facilitate the use of AltiContact Manager's centralized recording capabilities. This application performs recorded file management — indexing, converting, tracking, playback, reporting, and other critical functions for call center customers who would like to keep recorded files for administrative, legal, or quality assurance purposes.

Requirements

VRManager requires the following:

- VRManager License
- AltiWare AltiContact Manager (5.0 or higher)
- CPU: Pentium IV 2.0 G (minimum)
- Memory: 256 MB
- HD: IDE RAID 0-1 (minimum)
- NIC
- Microsoft Windows 2000/XP/2003
- Java 2 Runtime Environment (SE v1.4.2)
- MDAC (Microsoft Data Access Components)
- Microsoft Internet Explorer 6.0 or later. A minimum installation is sufficient, and Internet Explorer does not have to be the default browser.

VRManager License

VRManager requires a **VRManager License** to be installed at the AltiWare ACM system. You can verify the licenses when you run ACM Admin by selecting **About ACM Admin** on the **Help** menu, then clicking the **License Information** button to view a window that displays licenses and session information.

Installing VRManager

Note: Install VRManager on a different system than the one on which AltWare ACM Server is installed.

Pre-Setup Required for MSDE 2000

The MSDE 2000 database is installed with the VRManager **Setup** program. MSDE 2000 requires certain settings in order to install successfully. Before running **Setup**, please ensure the following.

- File and print sharing must be active on your operating system. To verify:
 1. In Control Panel, double-click **Network Connections**.
 2. On the Advanced menu, click **Advanced Settings**.
 3. On the **Adaptors and Bindings** page, ensure that **File and Print Sharing for Microsoft Networks** is selected.
- Make sure that **Silently succeed** is selected in the local security options named below.
 1. In Control Panel, double-click **Administrative Tools**.
 2. Double-click **Local Security Policy**.
 3. Expand **Local Policies**.
 4. Select **Security Options**.
 5. Ensure that the following option in the right pane is set to **Silently succeed** before installing:
 - On Windows XP and Windows 2003: **Devices: Unsigned driver installation behavior**.
 - On Windows 2000: **Unsigned non-driver installation behavior**.

- Problems can occur if you use a Terminal Services or Remote Desktop connection to attempt to install a new instance of MSDE 2000. If problems are encountered, restart the VRManager **Setup** program from the local computer without using Terminal Services or Remote Desktop.

Installing VRManager for a System Administrator

To install VRManager for a system administrator, you will use one of two methods: **Fresh install** and **Upgrade from previous version which supports MySQL**.

Fresh Install

If you do a fresh install, the installation program installs MSDE 2000 and Jservice Loader on your PC automatically.

1. Run the **Setup** program and follow the installation instructions as they appear on the screen.

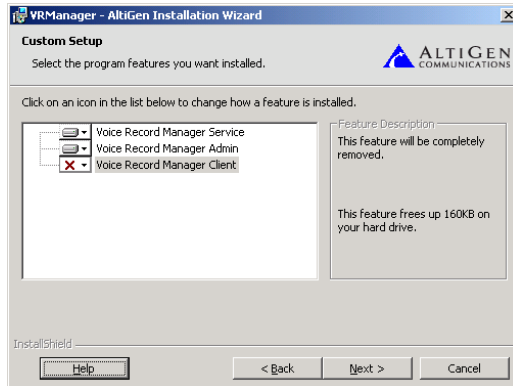


Figure 1. Custom Setup - VRM Admin

2. In the **Custom Setup** screen, choose to install **Voice Record Manager Service** and **Voice Record Manager Admin**, then click **Next**.

After installation, you can run VRManager Admin from **Start > Programs > VRManager > VRM Admin**.

Upgrade from Previous Version

If you upgrade from VRManager 5.0A, which uses MySQL, **Setup** installs VRManager and MSDE 2000 on your PC automatically. Then, in order to access existing data from the new version of VRM Client, you need to execute two more steps to convert the existing MySQL data to the new MSDE 2000 after installation.

To upgrade from a previous version:

1. Stop the VRM service, and run the **Setup** program.
2. Follow the installation instructions as they appear on the screen.
3. In the Custom Setup screen, choose to install **Voice Record Manager Service** and **Voice Record Manager Admin**, then click **Next**.
4. After installation is complete, download and install ODBC Driver for MySQL. The driver can be found at www.mysql.com.
5. In the DOS Command Prompt window, execute `\Altigen\AGJservices\bin\DBUpdate.exe` file.

All your existing data is converted into the new database automatically after execution, and you can use the new version of VRM Client to search data.

Installing VRManager for a Client

To install VRManager for a client system:

1. Run the **Setup** program and follow the installation instructions as they appear on the screen.

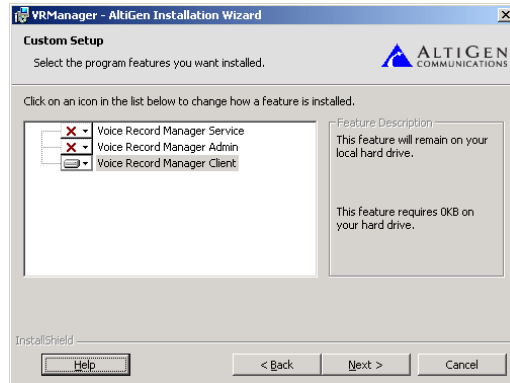


Figure 2. Custom Setup - VRM Client

2. In the **Custom Setup** screen, choose to install **Voice Record Manager Client** or **Voice Record Manager Admin**.

If you install VR Admin on a client system, some **Browse** buttons will not appear.

After installation, you can run VRManager Client from **Start > Programs > VRManager > VRM Admin** or **VRM Client**.

Setting Access Privileges

- The directory of centralized records in ACM Server must be shared fully with the VRManager user. This user not only requires privilege to read/write to the shared folder, but also read/write to the local folder.
- The destination of the backup location must be valid and accessible in the local computer or remote computer. The user must have full privilege to read/write to the shared and local folders.
- In Windows 2003 Server, the default setting of the OS security is very robust, so caution should be used when setting users' access privileges.

Using VRManager Admin

Login

To run VRManager Admin:

1. Choose **Start > Programs > VRManager > VRM Admin**. The VRM Admin Login dialog box opens.



Figure 1. VRM Admin Login

2. Enter the **VRM Server** IP address or server name and **Password**. (Default password is 22222.)
3. Check the **Save Password** checkbox if you want VRM Admin to remember the password the next time the program is run.
4. Click **OK**.

Note: Each Windows user has his own VRM Admin login setting.

VRM Admin Window

VRM Admin has five configuration pages:

- **User**
- **Pooling**
- **Storage**
- **Log**
- **AltiWare ACM**

User Page

The VRM **User** page displays the **User List** for VRManager clients. Here, an administrator can add or delete users, change user passwords, and change the VRM Admin password.

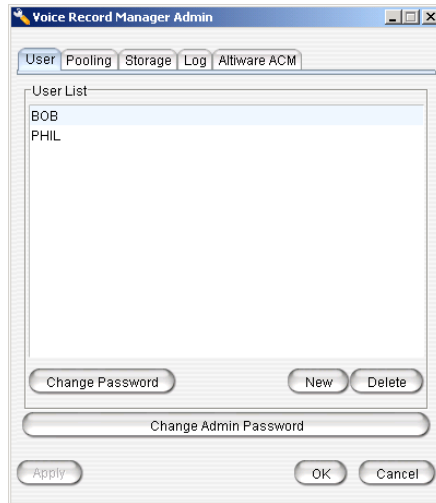


Figure 2. VRM Admin - User page

Adding Users

To add a new VRManager Client user:

1. Click the **New** button.
2. In the New User dialog box, enter a **User Name**, **Password** and **Password Confirmation**, then click **OK**. (The account name is NOT case-sensitive. For example, VRManager does not differentiate between the name "John" and "john" in a user account name.)

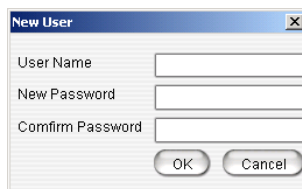


Figure 3. Add New User

The new user is displayed in the **User List** field.

Before the user can access VRManager Admin, the system administrator needs to install VRManager Client on the user's system.

Changing the Admin Password

To change the VRM Admin password:

1. Click the **Change Admin Password** button. The Change Admin Password dialog box opens.



The image shows a standard Windows-style dialog box titled "Change Admin Password". It features a title bar with a close button (X) on the right. The main area contains three text input fields, each with a label to its left: "Old Password", "New Password", and "Comfirm Password". Below the input fields are two buttons: "OK" and "Cancel".

Figure 4. Change Admin Password

2. Enter the information in the **Old Password**, **New Password** and **Confirm Password** fields.
3. Click **OK**.

Pooling Page

The pooling page lets you set the location of the primary storage directory. Use the **Browse** button to select the location. VRM Admin pools the newly recorded files from the AltWare server, and saves them into the primary storage directory in the .wav format you select here (**G.723.1**, **GSM**, or **PCM**).

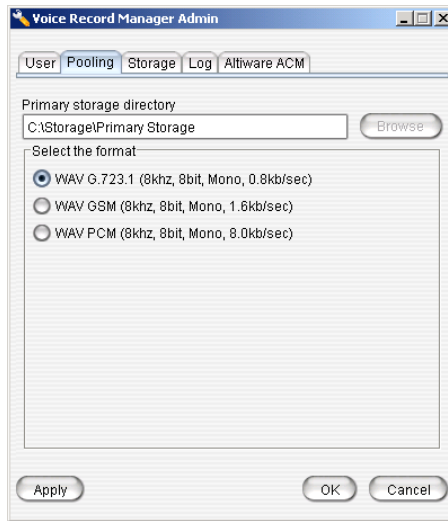


Figure 5. VRM Admin - Pooling Page

Note: The **Browse** button is not available if VRM Admin is running on a different server than VRM Service.

Storage Page

On the **Storage** page you can set backup conditions for the storage of voice records.

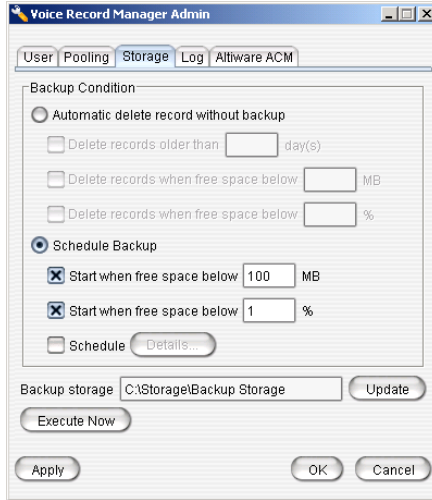


Figure 6. VRM Admin - Storage Page

Select one of the following conditions:

- **Automatic delete record without backup** - if selected, VRM Admin will delete records without backing them up. To set additional automatic delete parameters, select any of the following options:
 - **Delete records older than x day(s)**
 - **Delete records when free space below x MB**
 - **Delete records when free space below x %**
- **Schedule Backup** - if selected, VRM Admin will automatically back up, then delete records. To specify backup parameters, select any of the following options:
 - **Start when free space below x MB**
 - **Start when free space below x %**

Schedule - for detailed settings, click the **Details** button. In the Details dialog box, use the drop-down list to select the **Schedule Task** (Daily/Weekly/Monthly), use the up/down arrows to select the **Start Time** and to define the **Daily Schedule** (every x days),

Weekly Schedule (any day in every x weeks), or **Monthly Schedule** (any date in every month), then click **Apply**.

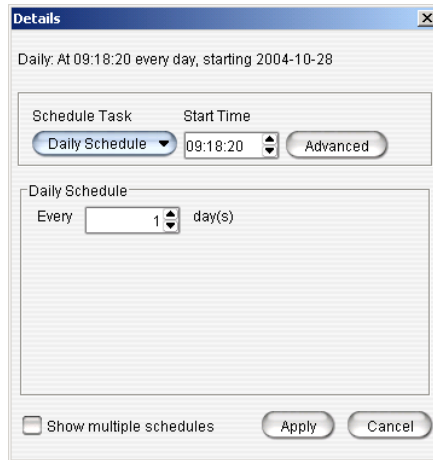


Figure 7. Details dialog box

Use the **Advanced** button to set a **Start Date** and **End Date**; or check the **Repeat Task** checkbox to set up parameters for a continuous schedule, then click **OK**.

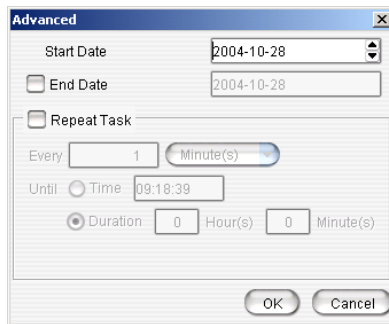
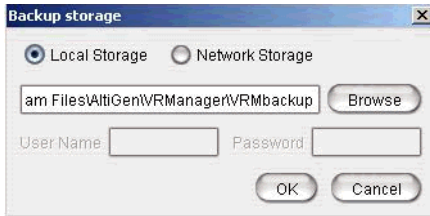


Figure 8. Advanced dialog box.

Check the **Show multiple schedules** checkbox to display and set up more than one schedule. You can add new multiple schedules, then modify them.

- **Backup Storage** - enter the location for the backup storage, or use the **Update** button to select a new location. If you click the **Update** button, the following dialog box opens:



This can be a local path or network path. The destination of the backup location must be valid and accessible in the local computer or remote computer. The user must have full privilege to read/write to the shared and local folders. Also, VRManager supports backup to DVD/RW; simply enter the path for the DVD/RW location.

Note: The **Browse** button is not available if VRM Admin is running on a different server than VRM Service.

- **Execute Now button** - clicking this button will begin backup of records.

When you have finished setting backup parameters, click **Apply** or **OK**.

Log Page

A log file for the VRM server is created each day named “yyymmdd.log” (for example, 20040404.log). A daily report for the VRM server is also created “yyymmdd.rpt” (for example, 20040404.rpt). The **Log** window allows an administrator to set the directory paths for VRM log and report.

Note: The **Browse** buttons are not available if VRM Admin is running on a different server than VRM Service.

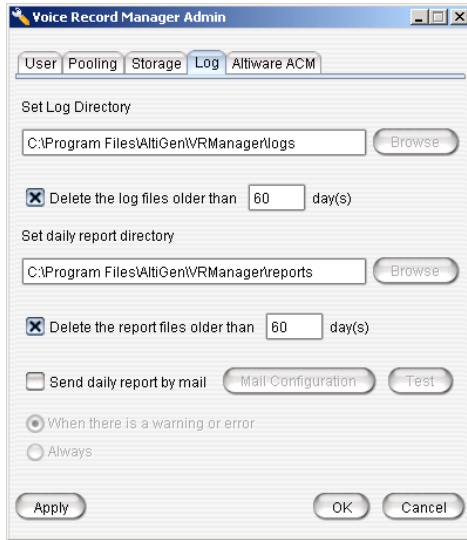


Figure 9. VRM Admin - Log page

- **Set Log Directory** - use the **Browse** button or enter a path in the field to specify where you want log files to be saved; check the **Delete the log files older than x days** checkbox to delete archived log files.
- **Set Daily Report Directory** - use the **Browse** button or enter a path in the field to specify where you want daily report files to be saved; check the **Delete the log files older than x days** checkbox to delete archived daily report files.
- **Send daily report by mail** - if you check this option, VRM will send a report **When there is a warning or error** or **Always**. Use the **Mail Configuration** button to configure the recipient's email address. Use the **Test** button to send a test email.

Click **Apply** or **OK** when finished.

AltiWare ACM Page

The **AltiWare ACM** page displays the AltiContact Manager servers and centralized recording directories that VRManager will access. Here, administrators can add or delete ACM servers, and specify the centralized recording directory for the specified ACM server.



Figure 10. VRM Admin - AltiWare ACM page

Adding Servers

To add a new ACM server, do the following:

At the AltiServ system

1. Make sure the Centralized Storage directory is located on the local drive on the AltiServ system.
2. Share the storage directory with Full Control to a domain user or local administrator.

At the VRM Server

1. In the **AltiWare ACM** page of VRM Admin, click the **New** button. The Add New Server dialog box appears.



Figure 11. Add New Server

2. Enter the **ACM Server IP Address**, **Centralized Recording Directory** (the Share name of the centralized recording folder), **User Name** and **Password**. Then click **OK**. If the user account belongs to an NT domain, you must enter “NTDOMAIN;username” in the User Name edit box. If the account is local Administrator, just enter administrator.

After adding a new server, VRM Service immediately checks the AltiWare server for the **VRManager License**.

The newly added server is displayed in the **AltiWare ACM Server List** field.

Note: VRManager starts converting all voice recording data as soon as the ACM Server information is added to the AltiWare ACM Server List.

Changing the Centralized Recording Directory

To edit an ACM server's location for the centralized recording directory, highlight the ACM server in the server list, then input the new location in the **Centralized Recording Directory** field.

Using VRManager Client

Login

To run VRManager Client:

1. Choose **Start > Programs > VRManager > VRM Client**. A Login dialog box opens.

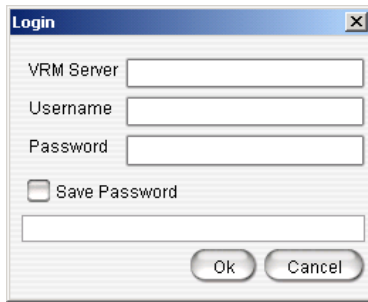


Figure 1. VRM Client Login

2. Enter the **VRM Server** IP address or server name, **User name** and **Password**.
3. Check the **Save Password** checkbox to have VRM Client remember the password the next time the program is run.
4. Click **OK**.

Note: Each Windows user has his own VRM Client login setting.

VRM Client Main Window

When you start VRM Client, the first window you see is the VRM Client main window.

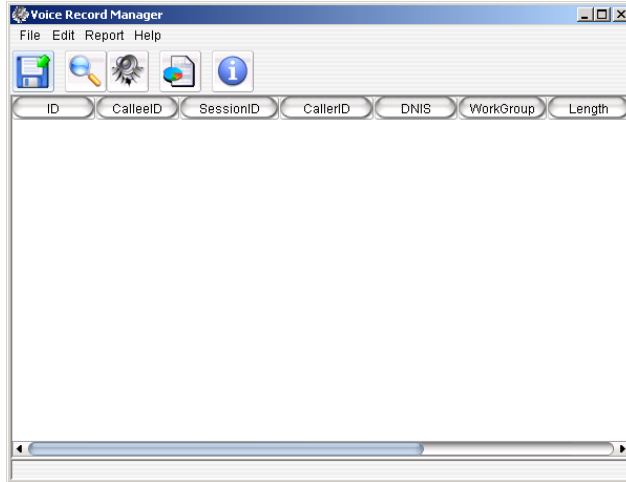


Figure 2. VRM Client main window

At the top is a menu bar, and below is a quick-access toolbar. At the bottom is a scroll bar for viewing the display columns.

Note: Each Windows user has his own VRM Client display column in the main window.

Menu Bar

Using the menus, you can perform the following functions:

- **File** – Save As, Export to File, Change Password, Exit
- **Edit** – Search, Play, Display Column, Option
- **Report** – Generate report
- **Help** – VRM Client version information

Quick Access Toolbar

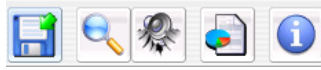


Figure 3. Quick Access Toolbar

The toolbar contains buttons that are menu shortcuts:



Save As. Saves the selected voice recording to a specified location.



Search. Opens the Search dialog box.



Play. Plays the selected voice recording.



Report. Opens the Report Generation dialog box.



About. Opens VRM Client version information.

File Menu

Saving Files

To save a file, click on a voice record in the main window to highlight it, and click the **Save As** button. OR, right-click on a voice record, and select **Save As**. OR, click on a voice record to highlight it, and choose **File > Save As** from the main menu.

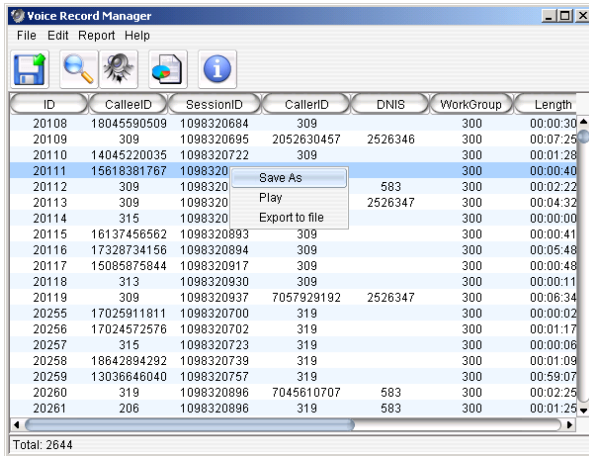


Figure 4. Saving a Voice Record

Export to File

To export search results to a tab-separated text file (.txt), choose **File > Export To File** from the main menu, OR right-click the search results list and choose **Export To File**.

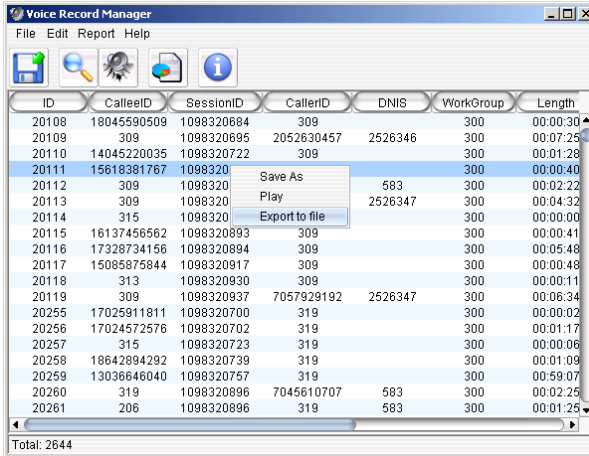


Figure 5. Export to File

Change Password

To change your password:

1. Choose **File > Change Password** from the main menu.
2. In the **Change User Password** dialog box, enter the necessary information in the **Old Password**, **New Password** and **Confirm Password** fields, then click **OK**.

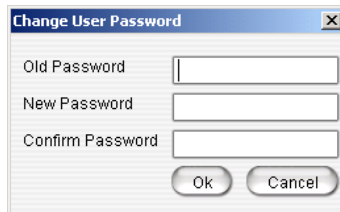


Figure 6. Change User Password

The new password applies at the next log in.

Edit Menu

Searching Voice Records

To search voice records, choose **Edit > Search** or click the **Search** button in the toolbar. In the Search dialog box, you can search based on the following conditions:

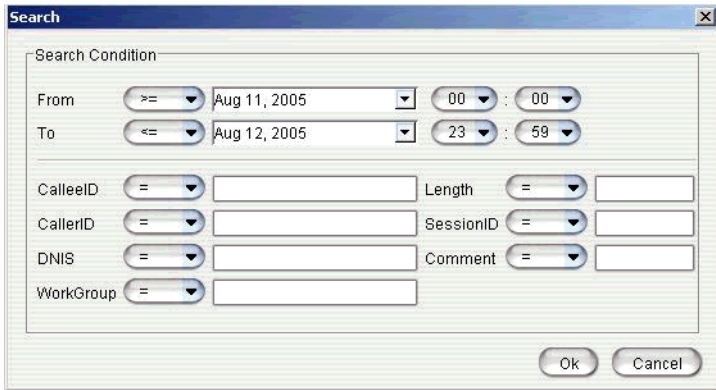


Figure 7. Search dialog box

The relational symbols for each condition include:

- = (equal)
- < (greater than)
- > (less than)
- >= (less than or equal to)
- <= (greater than or equal to)
- <> (not equal)
- like (look for sub-string)
- btwn (between)
- in—searches the results in sets; for example, CallerID “In” “101 AND 102” means CallerID equals 101 or CallerID equals 102.

Notes

- Typing “OR” in upper case in the edit box means “or.”
- Typing “AND” in upper case in the edit box means “and.”

- To leave out a condition, leave the edit box empty.
- The date/time format is the same as the system format of the operating system.
- Only the **Comment** column will be editable directly from the main view window.

Playing Voice Records

To play a voice record:

Click on a voice record in the main window to highlight it, and click the **Play** button. OR, right click on a voice record and select **Play**. OR, click on a voice record to highlight it, and choose **Edit > Play** from the main menu.

ID	CalleeID	SessionID	CallerID	DNIS	WorkGroup	Length
20108	18045590509	1098320684	309		300	00:00:30
20109	309	1098320695	2052630457	2526346	300	00:07:25
20110	14045220035	1098320722	309		300	00:01:28
20111	15618381767	1098320			300	00:00:40
20112	309	1098320		583	300	00:02:22
20113	309	1098320		2526347	300	00:04:32
20114	315	1098320			300	00:00:00
20115	16137456562	1098320893	309		300	00:00:41
20116	17328734156	1098320894	309		300	00:05:48
20117	15085875844	1098320917	309		300	00:00:48
20118	313	1098320930	309		300	00:00:11
20119	309	1098320937	7057929192	2526347	300	00:06:34
20255	17025911811	1098320700	319		300	00:00:02
20256	17024572576	1098320702	319		300	00:01:17
20257	315	1098320723	319		300	00:00:06
20258	18642894292	1098320739	319		300	00:01:09
20259	13036646040	1098320757	319		300	00:59:07
20260	319	1098320896	7045610707	583	300	00:02:25
20261	206	1098320896	319	583	300	00:01:25

Figure 8. Playing Voice Records

Note: Deleted voice files are not played.

Displaying Columns

You can select which columns you want displayed in the main view window. These are the column headers you can select from:

- **ID**
- **Callee ID**
- **Session ID**
- **Caller ID**

- **DNIS**
- **Workgroup**
- **Length**
- **Date**
- **State**—there are three states that a record file can be in:
 - *Delete* - if in this state, a record cannot be played or saved.
 - *Backup* - if in this state, you must manually put the right backup media in the path if you back up the record and remove it.
 - *Normal* - if in this state, the file can be played or saved.
- **Comment**

To select columns for display:

1. Choose **Edit > Select Column**.
The Select Column dialog box opens. The fields in the **Visible** list are displayed as columns under the VRM toolbar..

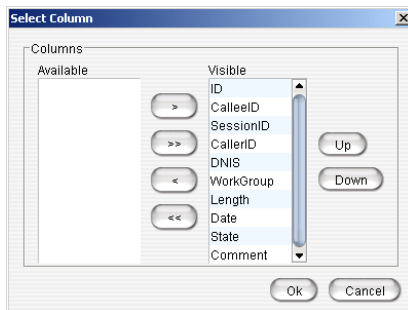


Figure 9. Select Column dialog box

2. Use the arrow keys (< or >) to move a field from one list to the other. You can use the << or >> buttons to move the entire group of fields from one list to the other.
3. Click **OK** when finished.

Sorting

In the main view window, you can click on a specific column heading to sort records in ascending or descending order on that field. You can use the scroll bar at the bottom of the window to view all the displayed columns.

Media Player Option

VRM client plays the selected file using a media player defined by the user. If the media player is not defined, VRManager does not play the file, and instead opens the Media Player Location dialog box so you can assign a media player. You can also select the media player by going to **Edit > Option**. In the **Option** dialog box, select the Media Player Location by typing the path in the field or using the browse button (...), then click **OK**.

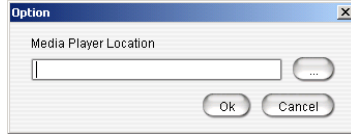


Figure 10. Option dialog box

Report Menu

You can generate reports based on agent, workgroup, DNIS or date.

To generate a report:

1. Choose **Report** from the main menu or click the **Report** button. The Report Generation dialog box opens.

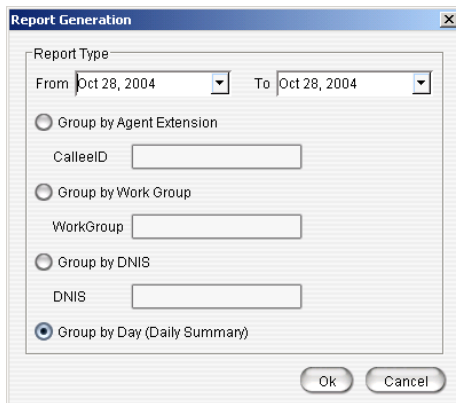


Figure 11. Report Generation dialog box

2. In the Report Generation dialog box, click the Down arrow to select From and To dates from a calendar.
3. Select one of the following format options:

- **Group by Agent Extension** - enter the extension in the **Callee ID** field.
 - **Group by Workgroup** - enter the workgroup number in the **Workgroup** field.
 - **Group by DNIS** - enter the DNIS number in the **DNIS** field.
 - **Group by Day (Daily Summary)** - formats report based on date period summary for each day.
4. Click **OK**.
 5. VRM Client generates a separate **Report** window displaying the selected report parameters. From there, you can select **Print Setup**, **Preview**, **Print**, or **Export** (as a tab-separated text file).

Date	Number of Record	Total Length	Total Size(K)
2004-10-25	157	08:36:44	24236
2004-10-26	219	12:05:51	34038
2004-10-27	198	13:01:53	36657
2004-10-28	173	11:27:09	32220
2004-10-29	202	12:18:55	34639
2004-10-30	2	00:05:11	244
2004-11-01	62	03:57:55	11156

Figure 12. Report Results

Index

A

- adding
 - client users 8
 - servers 16
- admin password, changing 9
- AltiGen Communications
 - contact information ii
- AltiWare ACM page 15
- automatic delete record without backup 11

B

- backup 6, 13
 - location 6, 13
 - schedule 11
 - storage 13

C

- centralized recording directory, changing 17
- changing
 - admin password 9
 - centralized recording directory 17
 - client password 23
- client users, adding 8
- column display 25

D

- deleting records 11
- displaying columns 25

E

- Execute Now button 13
- export to file 23

I

- installing VRManager 3

L

- license, VRManager 2
- log file, configuring 13
- login, VRM Client 19

M

- media player, assigning 27

P

- password
 - changing admin 9
 - changing client 23
- playing voice records 25
- privileges 6

R

- records
 - playing 25
 - searching 24
 - sorting 26
- reports, generating 27
- requirements, VRManager 1

S

- saving files 22
- schedule backup 11
- search symbols 24
- searching voice records 24
- servers, adding 16
- sorting records 26
- storage
 - backup 13
 - directory, setting 10

T

- toolbar 21

V

- voice records
 - playing 25
 - searching 24
- VRM Admin

- AltiWare ACM page 15
- log page 13
- pooling page 10
- storage page 11
- user page 8
- VRM Client
 - edit menu 24
 - file menu 22
 - generating reports 27
 - login 19
- VRManager
 - configuring 7
 - installing 3
 - license 2
 - requirements 1
- VRManager Admin
 - using 7
- VRManager Client
 - using 19